



## Introduction to the 2015 Texas Public Library Annual Report

Stacey Malek, Program Coordinator  
Texas State Library and Archives Commission  
Library Development and Networking Division  
Tuesday, January 12, 2016, 2:00 PM

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## What's covered

- Reasons to report
- Rules, deadlines
- Accreditation
- Annual report
- Data collection portal
- Resources

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## Why Report?

**"Without data, all you are is just another person  
with an opinion."** (Author Unknown)

- Participation in National Public Library Data Collection System  
<https://www.ims.gov/research-tools/data-collection>
- Accreditation in Texas State Library System
- If you don't report, we have no information about your library!

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## Rules

Texas Administrative Code §1.71 - §1.86  
**Minimum Standards for Accreditation of Public  
 Libraries in the State Library System**

<http://tinyurl.com/TACaccreditation>

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## Rules

OFFICE of the SECRETARY of STATE  
 Texas Administrative Code

TITLE 13 CULTURAL RESOURCES  
 SUBTITLE 1 TEXAS STATE LIBRARY AND ARCHIVES COMMISSION  
 CHAPTER 1 LIBRARY DEVELOPMENT  
 SUBCHAPTER 1 MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

**Rules**

- §1.71 Definition of Population Served
- §1.72 Public Library Service
- §1.73 Public Library Legal Establishment
- §1.74 Local Operating Expenditures
- §1.75 Nonrecognition
- §1.77 Public Library Local Government Support
- §1.79 Provisional Accreditation of Library
- §1.80 Professional Accreditation of Library
- §1.81 Quantitative Standards for Accreditation of Library
- §1.82 Accreditation Based on Current Operating Budget
- §1.83 Other Requirements
- §1.84 Professional Librarian
- §1.85 Annual Report
- §1.86 Standards for Accreditation of Libraries Operated by Public School Districts, Institutions of Higher Education, Units of Local, State, or Federal Government, Accredited Non-Public Elementary or Secondary Schools, or Special or Research Libraries

HOME TEXAS REGISTER TEXAS ADMINISTRATIVE CODE OPEN MEETINGS

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## §1.71 – Population Assignment

- Assigned by sources of governmental entity funding: city, county, school district
- Multiple libraries in a county that receive city and county revenue have population assigned in proportion to city size, as compared to county
- Not based on geography



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## §1.85 - Deadlines

### Texas Administrative Code §1.85 Annual Report

*"A public library shall file a current and complete annual report with the Texas State Library and Archives Commission by April 30. Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after July 31..."*

Target ▶▶▶ **MARCH 31, 2016**



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## Resources

- Annual Report webpage, Texas State Library  
<https://www.tsl.texas.gov/landing/statistics.html>
- LibPAS – data collection portal:  
<https://tx.countingopinions.com/main.php>

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## Resources

### Library Development & Networking (LDN) 800-252-9386 toll free, in Texas

Valicia Greenwood, Library Statistics Specialist  
[valicia.greenwood@tsl.texas.gov](mailto:valicia.greenwood@tsl.texas.gov), 512-463-5466

Stacey Malek, Program Coordinator  
[stacey.malek@tsl.texas.gov](mailto:stacey.malek@tsl.texas.gov), 512-463-5532

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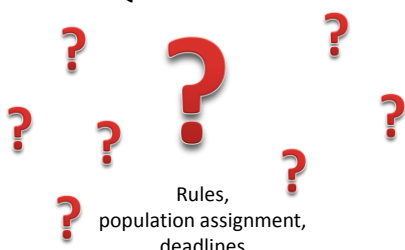
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**QUESTIONS**



Rules,  
population assignment,  
deadlines

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**Accreditation Benefits**



- TexShare card
- TexShare databases
- Interlibrary Loan ILL
- E-rate
- Competitive grants

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**Accreditation Criteria**

- Contact criteria
  - Published phone
  - Website

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## Accreditation Criteria

- Financial criteria
  - Expenditure criteria
  - Maintenance of Effort (MOE)
  - Government support



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## Maintenance of Effort

### §1.74 – Local Operating Expenditures

Question 4.2: Local Funds used for Library Operating Expenditures

- 3-year average
- Calculated two ways
- Exemption amount

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## Maintenance of Effort

Look it up!

<https://www.tsl.texas.gov/ld/pubs/arsma/index.html>

2015 Annual Report Blank Worksheet  
Word format | PDF format

2015 Application Form for Accreditation in State Library System  
Word format | PDF format

**Tips and Tools**

**Tip sheet: Reporting Downloadables**  
Word format | PDF format

**Population & MOE Planning Tool.xlsx**  
A quick view of your library's population assignment and MOE for local fiscal year 2015 (question 4.2).  
NOTE: May need to "Enable Editing" in Excel after downloading. Contact staff regarding issues or questions about this tool.

**Weekly Total Tool.xlsx**  
A simple calculator for libraries with branches to determine unduplicated hours (question 11.3).

**Indirect Costs Information**  
Indirect costs can be included when a library fails to meet Maintenance of Effort. An indirect cost is a cost incurred assigned to the library's budget, but paid for by a local government agency on behalf of the library.  
Indirect Cost Examples - Word format | PDF format  
Indirect Cost Documentation Sample - Word format | PDF format

**Accreditation Appeal**  
Public libraries that do not meet certain accreditation criteria have the option to appeal loss of accreditation. Appeal LSAB at their summer meeting. The board makes a recommendation to the Director and libraries, who either be not be favorable to the library, the library can appeal directly to the commission at their summer meeting.

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## Accreditation Criteria

**RULE §1.81: Per capita minimums, by population category  
FY15 and FY16**

Library population Assignment	FY2015	FY2016
500,001+	\$13.82	\$13.89
200,001 – 500,000	\$11.95	\$12.01
100,001 – 200,000	\$9.60	\$9.79
50,001 – 100,000	\$8.00	\$8.16
25,001 – 50,000	\$5.31	\$5.42
10,001 – 25,000	\$4.25	\$4.34
5,001 – 10,000	\$3.97	\$4.05
1 – 5,000	\$3.70	\$3.77

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## Accreditation Criteria

### Service criteria

- Searchable catalog
- # Items in collection, how current
- Long-range plan
- Copier, computer for staff and public
- Interlibrary loan (ILL)
- Hours library available to public



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## Accreditation Criteria

### Librarian qualification criteria

- Professional librarians (libraries serving more than 25,000 persons)
- Number of hours employed
- Continuing Education requirement



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## QUESTIONS



Accreditation

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## Texas Public Library Annual Report

- Basic facility information for central library
- Financial information
- Library operation statistics

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## Basic Facility Information

Section 1 - Contact information

Section 2 - Number of outlets, square footage

- Branch information will be reported in Section 12



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## Financial Information

### Section 3 – Expenditures

**REPORT ACTUAL EXPENDITURES,  
NOT BUDGETED AMOUNTS**



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## Financial Information

### Section 3 – Expenditures

**3.1-3.11 Library Operating Expenditures**  
**3.1 - 3.3 Staffing Expenditures**  
**3.4 - 3.7 Collection Expenditures**





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## Financial Information

### Section 3 – Expenditures

**3.8 Other Operating Expenditures**  
**3.12 Library Capital Expenditures**





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## New question

**3.0** Did the library expend any funds from sources *outside the library's home county* such as Tocker Foundation, Dollar General, Hancher Foundation, Texas Book Festival, NEA, or similar sources?

If **Yes**, include in Section 3, but not in Section 4.

If **No**, include all expenditures from Section 3 in Section 4.

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## Financial Information

### Section 4 – Local Financial Effort

#### ▪ 4.1 Local funds used for collection materials

Exclude grants from outside library's home county



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## Financial Information

### Section 4 – Local Financial Effort

#### ▪ 4.2 Local funds used for library operating expenditures - Used for calculating **MOE**

#### ▪ 4.3 Local government funds used for library operating expenditures - Accreditation criteria



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## Financial Information

### Section 5 – Revenues



**Report revenues when received, whether expended (used) or not .**

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## Financial Information

### Section 5 – Revenues

#### **5.1 – 5.12** Revenues used for library *operation*

5.9 Grants – Local and non-local. **Indicate Source!**

5.10 Other local sources of funding – Friends, donations, fines, fees, etc. No “in kind” amounts



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## Financial Information

### Section 5 – Revenues

#### **5.13 – 5.21** Revenues used for *capital* expenditures

#### **5.22 – 5.23** Revenue sources *outside* home county

**Skip question if all revenue came from local sources.**

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## Library Operation

### Section 6 – Library Collection

- Physical materials: titles vs items
- Downloadable materials: library vs consortium
- Databases
- Totals
- One percent

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## Library Operation

### Section 7 – Services

- Long-range plan
- Reference transactions
- Library visits
- Users
- Circulation: Physical vs digital
- Programs: Events and Attendance



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## Library Operation

### Section 8 – Staffing

- Hours worked
- Director/head librarian's salary and Continuing Education  
<https://www.tsl.texas.gov/ld/librarydevelopments/>
- Equipment available to staff



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## Library Operation

### Section 9 – Resource Sharing

<https://www.tsl.texas.gov/landing/ill.html>

Accreditation issue – Statewide ILL

Contact: Sara Hayes, ILL Coordinator  
[sara.hayes@tsl.texas.gov](mailto:sara.hayes@tsl.texas.gov)  
 512-463-5406



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## Library Operation

### Section 10 – Internet and Computer Use

Accreditation issue: website

Contact: Henry Stokes, Library Technology  
 Consultant  
[henry.stokes@tsl.texas.gov](mailto:henry.stokes@tsl.texas.gov) 512-463-6624



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## Library Operation

### Section 11 – Library Hours

Accreditation issue: unduplicated hours

#### Weekly Total Hours Calculator – COMPOSITE NUMBER OF HOURS

This chart is provided as an aid in calculating the total number of hours of library service provided by your main library and branches. Please enter "1" in the space for each hour in which any part of your library facilities is open. If a library is open only part of a given hour, enter "1/2", "3/4", etc. Add each column to determine the weekly total for a regular week. Report the totals in the spaces below, and then the total weekly Total Amount in T18.

TIME	SUN	MON	TUES	WED	THUR	FRI	SAT
7:00 - 8:00 a.m.							
8:00 - 9:00 a.m.							
9:00 - 10:00 a.m.							
10:00 - 11:00 a.m.							
11:00 - 12:00 p.m.							
12:00 - 1:00 p.m.							
1:00 - 2:00 p.m.							
2:00 - 3:00 p.m.							
3:00 - 4:00 p.m.							
4:00 - 5:00 p.m.							
5:00 - 6:00 p.m.							
6:00 - 7:00 p.m.							
7:00 - 8:00 p.m.							
8:00 - 9:00 p.m.							
9:00 - 10:00 p.m.							
<b>WEEKLY TOTALS</b>	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>WEEKLY TOTAL</b>							

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## Application for Accreditation

Application form is found on

- Blank worksheet forms
- <https://tx.countingopinions.com/main.php>
- <https://www.tsl.state.tx.us/ld/pubs/arsma/index.html>



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## QUESTIONS



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## Online Data Collection

LibPAS

<https://tx.countingopinions.com/>



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## Home Page

**Welcome Texas Public Library**

Click on the Enter button below to complete the online survey form

**Enter**

Forms, Tools and Tips for Texas Public Libraries Annual Report

**Forms**

- Blank Annual Report Worksheet
- Application form for Accreditation in State Library System

**Tools**

- Population & MOE Planning Tool
- Weekly Total Tool

**Tips**

- Reporting Downloadables
- How to use the Online Form
- Public Library Annual Report Webpage

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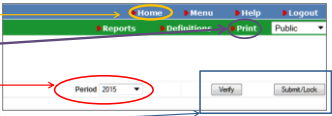
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## Data Input

Form features

- Home
- Print
- Period
- Submit Form



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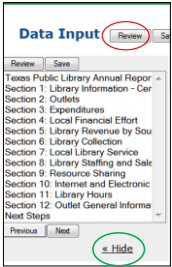
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## Data Input

- Navigation



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**Data Input**

- Annotations
- Definitions

Include all operating expenditures from the library budget, microform, electronic, and other formats considered part of the library's collection. Exclude charges or fees for document delivery.

3.4 Print Materials Expenditures

**Indicator Notes**

This is often useful for recording details about interpretation of the definition in local terms. Examples: who to contact for information, a translation of the text, etc.

Questions (Indicator)	Print Materials Expenditures
Definition	Books, serial back files, current serial subscriptions, government documents, and any other print acquisitions.

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**Data Input**

Use annotations/notes/explanations!

**Edit check**

Current Value: \$0  
Previous period value: \$37,069,702

**EDIT CHECK:**  
PRINT MATERIALS EXPENDITURES prior year is greater than 15,500 and current year is zero. Please check the current year value for possible error or provide an explanatory note for the change.

To Accept this value, please provide/select an explanatory Note, otherwise select Cancel to update the value.

4 Print Materials Expenditures

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**Data Input**

**PI Value Notes**

3.4 Print Materials Expenditures

Input note here to explain the anomalous value, or select any existing note(s) (shown below, if applicable) to apply the selected note to the PI value.

**Notes**

Add Cancel

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## Reports

Home
Menu
Help
Logout

Reports
Definitions
Print
Public

Period: 2015
Verify
Submit/Lock

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## Reports

### Manage Reports

To generate a report, select an existing report by [Name](#) (below) or use the [Library](#), [Topic](#) and/or [Statistics](#) Report links from the navigation bar (above).  
 Use the [Add](#) button to create a new report in a Local folder.  
 To [View](#) or [Remove](#) one or more reports, select the report(s). Use the checkboxes in the first column and ...  
 Use the [Remove](#) button to remove the report(s) that you previously created.  
 Use the [Move](#) button to move the report(s) to another local folder that you previously created.  
**Published Reports** (see below) are available to share with anyone, using the associated URL.

Local
EX

Annual Statistics
Demographic Reports
Merge Documents

Report Name	Report Type	Collection	Description	Updated
2012 Branch Statistics	Table	Texas Outlier Data	published	2014-05-11 12:19:24
2012 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-05-11 12:19:06
2012 Branch Statistics	Table	Texas Public Libraries Annual Report	published	2014-05-11 12:19:25
2013 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-05-11 12:19:29
2013 Branch Statistics	Table	Texas Public Libraries Annual Report	published	2015-08-06 14:43:46
2014 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2015-10-22 11:53:47

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## Reports

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Local
EX

Annual Statistics
Demographic Reports
Merge Documents

Report Name	Report Type	Collection	Description	Updated
2012 Library Statistics	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2011 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (.docx preferred), since it is downloaded.	2013-10-15
2012 Library Statistics	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2012 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (.docx preferred), since it is downloaded.	2013-10-23
2013 Library Statistics	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2013 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (.docx preferred), since it is downloaded.	2015-09-01
2013 Texas Year Completion Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2012 and 2013, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (.docx preferred), since it is downloaded.	2014-12-10
2013 Texas Year Completion Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2013 and 2014, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (.docx preferred), since it is downloaded.	2015-09-01

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## QUESTIONS



Data collection portal

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## Contact Us!

**Library Development & Networking**  
[ld\\_services@tsl.texas.gov](mailto:ld_services@tsl.texas.gov), 800-252-9386

**Valicia Greenwood**, Library Statistics Specialist  
[valicia.greenwood@tsl.texas.gov](mailto:valicia.greenwood@tsl.texas.gov), 512-463-5466

**Stacey Malek**, Program Coordinator  
[stacey.malek@tsl.texas.gov](mailto:stacey.malek@tsl.texas.gov), 512-463-5532

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